Guest,

Welcome to:

The Organizational Tune-Up

Presented by
Lighthouse Consulting Services, LLC
What's your biggest time management challenge these days?
Key Questions – Organization & Infrastructure

Needs Assessment

What’s your biggest need?
Tips, Tools, & Techniques

12

Featured Guest:
Bruce Breier
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In-Depth Work Style Personality Testing
In-Depth Work Style Personality Assessments
Why In-Depth is Best
Work Style Personality Testing
Work Style Assessments
Pre-Employment Testing

Talent Development
Talent Development Workshops
Skills Testing
Team Building Service
Outplacement Services
Sino American Management Style
Interpersonal Coaching

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How to Pick a Strategic Planner and Use In-Depth Work Style Assessments to Improve Planning Performance
The Next Recession Is Just Around the Corner. Are You Ready?

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Business Plan

Monthly Review
How did we do last month?
How are we doing year-to-date?
What changes in our plan are needed?
What are our commitments for next month?
Success
Description
[Goals-Strategy-Metrics]
Organizational Task Force
Weekly Planning
Workday Bookends
Master Task List

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Priority Work Time
[PWT]
Diagnosed Interruptions
Acutely Clear Delegation
One-to-One Briefings

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Group Meeting Protocol
Active-Only Email System
Unclutter Everywhere

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Key Ideas & Commitments

What's the most significantly important thing you heard today?
What's your impactful 30-day commitment?
Obstacles to High Effectiveness

Constant Distractions
LIFO Working
Inefficient Meetings
Email Overload
Lack of Motivation to Grow

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Where do I begin?
Attack Distractions
Policy for Interruptions

Turn-Off Notifications
Thank you
for attending
The Organizational Tune-Up
Click Here to contact our Featured Guest.
Presented by
Lighthouse Consulting Services, LLC
# The Organizational Tune-Up

Bruce H. Breier  
BHB Consulting Services  
La Jolla, California

## I feel most organized when...

<table>
<thead>
<tr>
<th>#</th>
<th>What’s your biggest time management challenge?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>................................................</td>
</tr>
</tbody>
</table>

## Needs Assessment

In the column to the right, place a check mark next to all items listed below that you feel would contribute to becoming more effectively organized in your executive role

<table>
<thead>
<tr>
<th>#</th>
<th>Needs Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>A more uncluttered work environment</td>
</tr>
<tr>
<td>2.</td>
<td>Increased clarity of the position expectations for all applicable staff (Success Descriptions)</td>
</tr>
<tr>
<td>3.</td>
<td>Clear policies and procedures that communicate acceptable organizational behavior to all staff</td>
</tr>
<tr>
<td>4.</td>
<td>Consistent proactive planning on a daily and weekly basis</td>
</tr>
<tr>
<td>5.</td>
<td>A better task management system to keep track of all commitments and action items</td>
</tr>
<tr>
<td>6.</td>
<td>More proactively scheduled time to accomplish daily priorities</td>
</tr>
<tr>
<td>7.</td>
<td>A reduction in the number of unjustified interruptions during the work week</td>
</tr>
<tr>
<td>8.</td>
<td>A better method to delegate tasks for improved on-time delivery</td>
</tr>
<tr>
<td>9.</td>
<td>Consistently effective and efficient one-to-one briefings with key individuals</td>
</tr>
<tr>
<td>10.</td>
<td>Improved organization and leadership of group meetings within the business</td>
</tr>
<tr>
<td>11.</td>
<td>A better system to organize and manage the email environment</td>
</tr>
<tr>
<td>12.</td>
<td>Improved harmony between my professional and personal life</td>
</tr>
</tbody>
</table>

Which of the above numbers is the biggest need right now? .................................→
<table>
<thead>
<tr>
<th>#</th>
<th>Organizational Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Unclutter <strong>everywhere</strong> (office, email, desk, home, car, etc.)</td>
</tr>
<tr>
<td>2.</td>
<td>Establish &quot;<strong>Success Descriptions</strong>&quot; for all pertinent positions, including yours</td>
</tr>
<tr>
<td>3.</td>
<td>Establish an <strong>Organizational Task Force</strong> to create applicable policies and procedures for the business</td>
</tr>
<tr>
<td>4.</td>
<td>Establish calendar commitments for <strong>weekly planning</strong> and the <strong>workday bookends</strong></td>
</tr>
<tr>
<td>5.</td>
<td>Select an <strong>excellent</strong> task management system that you download and upload to and from every day</td>
</tr>
<tr>
<td>6.</td>
<td>Institute Priority Work Time (PWT), time <strong>scheduled</strong> every day to accomplish daily priorities</td>
</tr>
<tr>
<td>7.</td>
<td>Consistently practice <strong>diagnosing</strong> prior to causing or receiving internal interruptions</td>
</tr>
<tr>
<td>8.</td>
<td>Always delegate with <strong>acute clarity</strong> inclusive of proper lead times and specific delivery dates and/or times</td>
</tr>
<tr>
<td>9.</td>
<td>Design and implement a schedule of <strong>proactive one-to-one briefings</strong> with direct reports</td>
</tr>
<tr>
<td>10.</td>
<td>Establish and consistently practice a <strong>protocol</strong> for all group meetings</td>
</tr>
<tr>
<td>11.</td>
<td>Consider converting to the &quot;<strong>Active-Only</strong>&quot; email method</td>
</tr>
<tr>
<td>12.</td>
<td>Through weekly planning, ensure that personal life goal commitments are included in the calendar</td>
</tr>
</tbody>
</table>

What’s the most significantly important thing that you heard during this presentation?

What’s the one impactful thing you will do during the next 30 days?